

Administrator Delegating Another Employee Worklist Overview

This document provides the step-by-step instructions used to delegate the Worklist from one employee (Approver) to another (Proxy Approver).

Note: this functionality is only available to employees who have the Delegator security role.

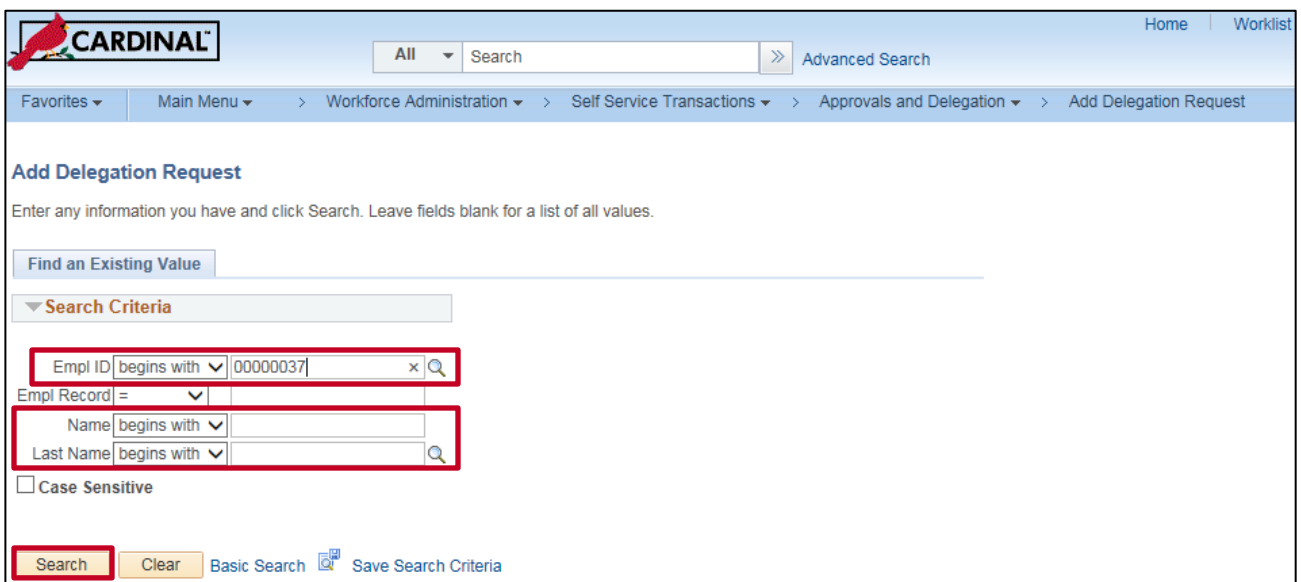
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Delegating An Employee's Worklist

1. Sign into Cardinal and access **Cardinal HCM**.
2. Navigate to the **Add Delegate Request** page using the following path:

Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request



The screenshot shows the 'Add Delegation Request' page in the Cardinal HCM system. The page has a blue header with the Cardinal logo and navigation links. Below the header is a breadcrumb trail: Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request. The main content area is titled 'Add Delegation Request' and includes a search criteria section. The search criteria section has a 'Find an Existing Value' button and a 'Search Criteria' dropdown. Below the dropdown are four search fields: 'Empl ID begins with' (containing '00000037'), 'Empl Record', 'Name begins with', and 'Last Name begins with'. There are also checkboxes for 'Case Sensitive' and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

3. The **Add Delegation Request** page displays.
4. Enter the **Empl ID** of the person that you need to delegate the work from, if unknown, you can search by using **Name** (first name) or **Last Name**.
5. Click the **Search** button.
6. If more than one employee meets the criteria entered, the **Search Results** section displays at the bottom of the page. You can select the employee from this list by clicking the **Empl ID** link.



Time & Attendance Job Aid

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CARDINAL All Search >> Advanced Search

Favorites > Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

Add Delegation Request

TOM SMITH Employee Emplid EMP00000037 Empl Record 0

Add Delegation Request

From Date	To Date	Trans Type	Transaction Name	Proxy	Name
03/27/2018	03/27/2018				

Maintain Delegated Authorities Administer Delegation

Save Return to Search Notify

7. Enter the **From Date**. If transactions need to be approved right away, populate the **From Date** field with the current date.
8. Enter the **To Date**. This is the date the delegation should end.

CARDINAL All Search >> Advanced Search

Favorites > Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

Add Delegation Request

TOM SMITH Employee Emplid EMP00000037 Empl Record 0

Add Delegation Request

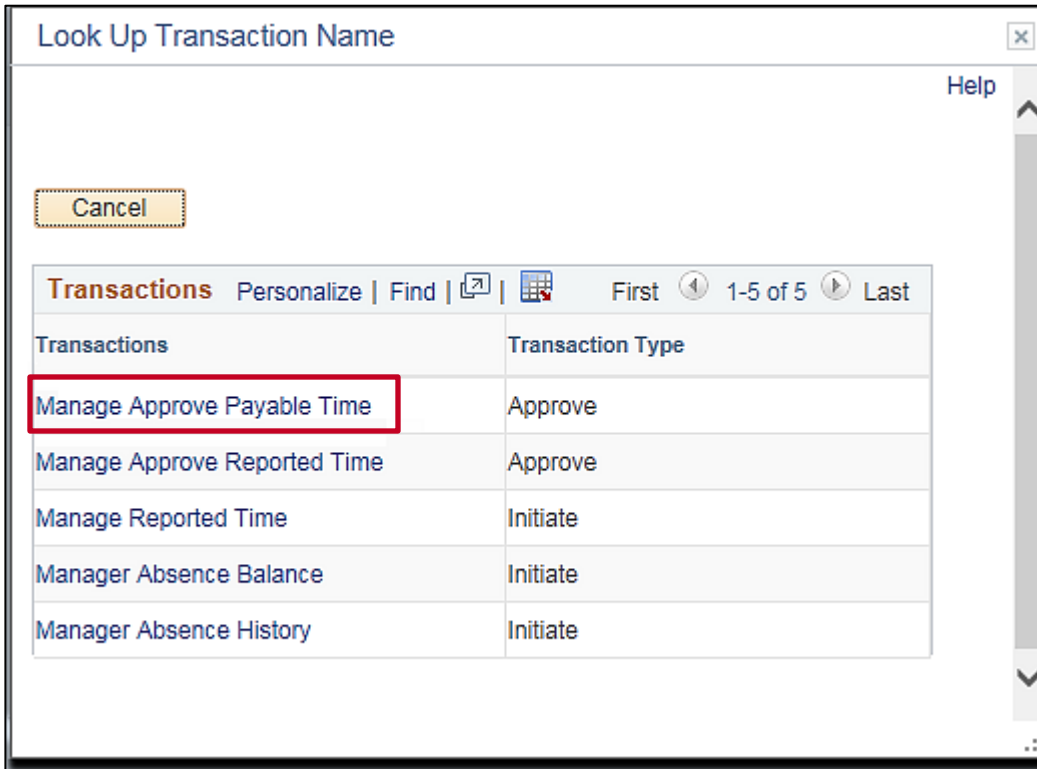
From Date	To Date	Trans Type	Transaction Name	Proxy	Name
03/27/2018	03/27/2018				

Maintain Delegated Authorities Administer Delegation

Save Return to Search Notify

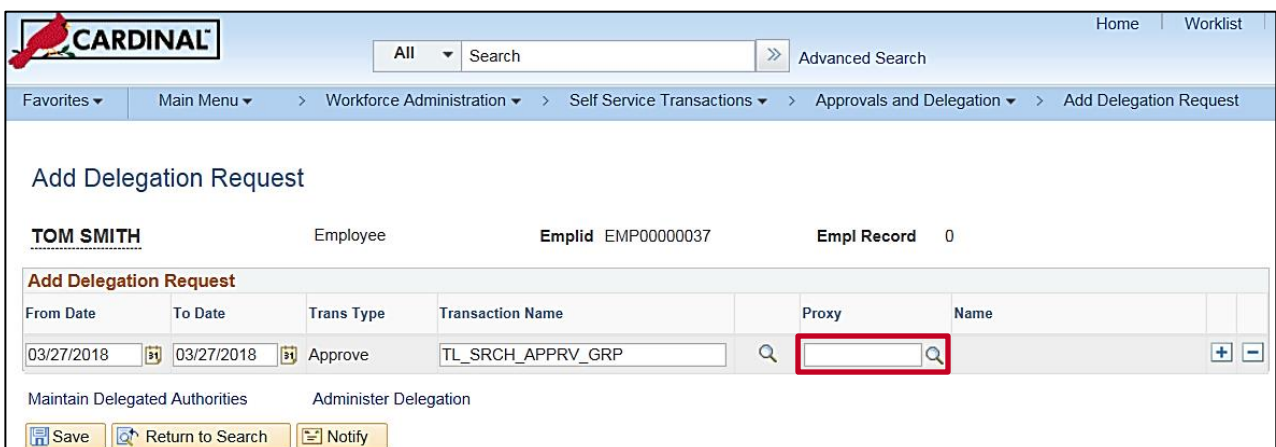
9. Select **Transaction Name** by clicking the lookup button.

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Transactions	Transaction Type
Manage Approve Payable Time	Approve
Manage Approve Reported Time	Approve
Manage Reported Time	Initiate
Manager Absence Balance	Initiate
Manager Absence History	Initiate

10. The **Look Up Transactions Name** list displays.
11. Click the **Transaction** (e.g., **Manage Approve Payable Time**) from the list. Typically, you should add all transactions to delegate.



From Date	To Date	Trans Type	Transaction Name	Proxy	Name
03/27/2018	03/27/2018	Approve	TL_SRCH_APPRV_GRP		

12. Enter the Employee ID in the **Proxy** field of the person you are delegating the transaction(s) to. Make sure the person you are delegating to has the Approver role. It is recommended that you delegate to a peer or an approver above you, not to a subordinate that reports to you even if this person has the approver role. This will avoid a circular workflow issue with your own time, which you cannot approve.



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Cardinal

All Search >> Advanced Search

Favorites > Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request

Add Delegation Request

TOM SMITH Employee Emplid EMP00000037 Empl Record 0

Add Delegation Request

From Date	To Date	Trans Type	Transaction Name	Proxy	Name
03/27/2018	03/27/2018	Approve	TL_SRCH_APPRV_GRP	00000348700	JOHN DOE

Maintain Delegated Authorities Administer Delegation

Save Return to Search Notify

13. Click on the plus sign (+) to add another row if you want to delegate additional transactions and repeat steps 9 -12 until you have added all the desired transactions. Typically, you should add all transactions to delegate.
14. Click the **Save** button.
15. Once you click the **Save** button an email is generated and sent to the proxy as well as to the employee you are delegating the worklist from. The delegation request also displays as a worklist item on the **Worklist** of the proxy.